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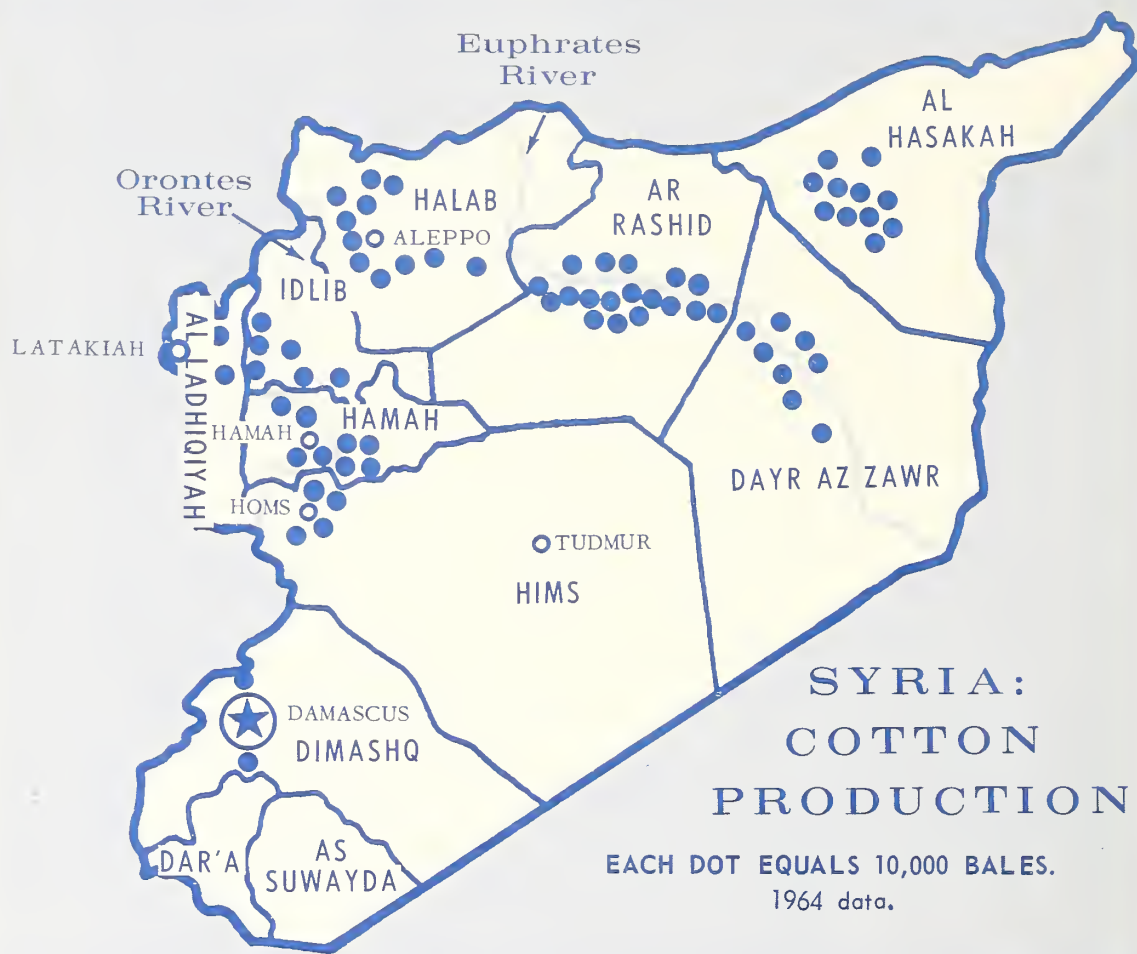
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COTTON IN
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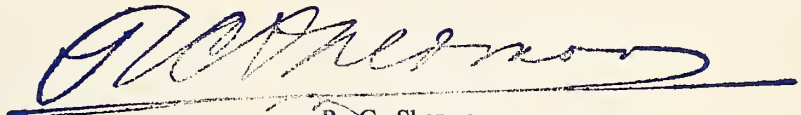
Foreword

Syria (Syrian Arab Republic) has recently become a major supplier in world cotton markets. In 1964 the country exported 726,000 bales compared with 162,000 bales annually for the 5-year average, 1950-54.

Despite rapidly changing political and economic conditions, private capital and initiative enabled Syria to increase cotton production more than tenfold, starting in the late 1940's. In early 1965, the Socialist Government of Syria nationalized virtually all aspects of the cotton industry. Although it is still too soon to evaluate fully the effects of nationalization, this study takes a close look at the Syrian cotton industry—the current situation and the outlook over the next few years.

The study is one in a series of reports on competitive agricultural developments in foreign countries. It is intended to help U.S. cotton interests to evaluate problems and potential in the Syrian cotton industry, and what competition it may offer U.S. cotton in foreign markets. An on-the-spot survey in the fall of 1965 provided much of the information for this study.

The authors wish to thank the many persons who so graciously contributed to this study. This includes Syrian Government officials, and persons on the staff of the American Consulate General in Aleppo and the American Embassies in Damascus and Beirut. Appreciation is extended to the Agricultural Research Service for permitting Dr. Lewis to assist with this study.

A handwritten signature in blue ink, appearing to read "R. C. Sherman", is written over a horizontal line.

R. C. Sherman
Director, Cotton Division

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Cotton festival in Aleppo draws buyers. Most cotton grows on level plains near rivers.

COTTON IN SYRIA

By VERNON L. HARNESS

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Within a relatively few years, Syria has raised its cotton production and sales sufficiently to place the country among the top ten world producers and exporters. Eighty-five to 90 percent of the crop is grown for export. As a consequence, not only has Syrian cotton become a significant factor in world cotton trade, but also cotton exports are a vital factor in Syria's foreign exchange picture. About half its customers—and most of its major ones—are at present Communist countries.

In spite of the recent rapid rise in production, Syria probably will not be able—within the next several years—to produce significantly more cotton than the current crop estimated at 810,000 bales. (All bales are 480 lb. net weight.) In fact, although a 5-percent annual increase in acreage is projected for the next 5 years under Syria's long-term development plans, production may decline. Additional land is not likely to be planted to cotton until more irrigation capacity is developed. This prospect seems at least several years away. At the same time, interest is increasing in diversified farming. Certainly, lower cotton prices could encourage a shift to alternative crops of fruit, vegetables, food grains, and possibly, in some areas, citrus and forage crops.

Syria's cotton production has doubled over the past decade, in response to additions in acreage and sharply higher yields (approximately 20 percent in the former and 60 percent in the latter). Yield increases have resulted from use of improved planting seed, more fertilizer and insecticides, and better cultural practices. Nearly all Syrian cotton is produced under irrigation.

While cotton production has been rising, Syria must solve a number of serious problems besides extension of irrigation before increasing production markedly. The serious buildup of soil salinity in several major cotton producing areas is a major barrier to higher yields. Yields in some fields have been noticeably reduced; in some other fields, parts have been withdrawn from crop use. Virtually none of the present irrigation systems provide for adequate drainage, and with a water table near the surface in many areas, the salinity problem is sure to become more critical.

Insect control, through use of airplane and hand equipment, seems adequate. However, Verticillium wilt

is spreading and in time may become serious.

Problems like control of seed quality and access of farmers to credit receive government attention. American upland planting seed is purchased yearly from the United States and multiplied for distribution to farmers. Production credit is provided by nationalized banks and government credit institutions. At present, no credit is extended beyond a single season.

Labor, especially for the harvest, is scarce; and cotton farming as now practiced is not conducive to further mechanization.

Syria exports more than 85 percent of production. At present, about two-thirds of total cotton exports goes to Communist countries. Among the many Free World nations that buy Syrian cotton, France, West Germany, Italy, the Netherlands, and Lebanon take the largest quantities. The Syrian textile industry has consumed increased quantities of cotton in the past decade and now uses about 95,000 bales annually.

In early 1965, the Syrian Government nationalized the purchasing, ginning, and exporting of cotton and also the textile industry. Since the 1965 harvest was the first to be handled by the nationalized marketing bureau, any assessment as to the effectiveness of the organization would be premature. However, it is obvious that the Syrian cotton industry is going through a critical adjustment period.

Table 1.—COTTON: Supply and distribution in Syria, 1955-65¹

Season ¹	Stocks Aug. 1 ²	Pro- duction	Total Supply	Consump- tion	De- stroyed	Ex- ports
	1,000 bales ³	1,000 bales ³	1,000 bales ³	1,000 bales ³	1,000 bales ³	1,000 bales ³
1955 -----	10	400	410	37	0	366
1956 -----	7	426	433	44	0	374
1957 -----	15	492	507	50	5	427
1958 -----	25	443	468	60	6	357
1959 -----	45	446	491	60	2	389
1960 -----	40	511	551	60	1	445
1961 -----	45	572	617	73	0	474
1962 -----	70	689	759	77	0	614
1963 -----	68	700	768	95	3	608
1964 -----	62	810	872	95	0	726
1965 ⁴ -----	51	810	861	95	6	710

¹ Beginning August 1. ² Includes cotton at mills and in trade channels. ³ 480 pounds net weight. ⁴ Estimated. Official and trade statistics of Syria and other sources.

The Raw Cotton Industry

Policy and research

Cotton is one of the mainstays of the economy in Syria. In addition to providing a livelihood for the people connected with its production, marketing, and consumption, cotton is the source of more than one-half of Syria's foreign exchange; and the industry generates a significant part of the government's revenue. The Syrian cotton industry was developed largely under impetus from private resources, and the momentum continued after the large, private estates were broken up in 1958. Most production is now in the hands of small producers, and acreage and prices are controlled. In early 1965, purchasing, ginning, marketing, exporting, and domestic mill operations were nationalized.

In broad terms, the national cotton policy is aimed at maintaining government revenue and foreign exchange, protecting farm incomes, raising domestic consumption of cotton, and diversifying farm enterprises.

Expansion of cotton production is being encouraged, but the main emphasis is on higher yields rather than additional acreage. Considerable work has been done in cotton breeding, selection, and multiplication at field experiment stations in major cotton areas. Less attention has been given to research on cultural practices, alternative crops, crop rotation, water use, and mechanization. The Syrians have imported many cotton varieties for experimental purposes. One notable research achievement was the selection from among these varieties of one well-adapted, high-yielding American upland variety. Planting seed of Coker 100A has been imported annually and increased locally to supply planting seed to all producers.

It is expected that the Syrian Government will continue to allocate large expenditures for research, extension, irrigation, and a number of other cotton programs. The Cotton Bureau, a semiautonomous government agency under the Ministry of Agriculture, has been a dominant force in the cotton industry. The Bureau has worked closely with farmers and merchants through research, extension, and various pest control activities. In June 1965, the Cotton Marketing Organization, attached to the Ministry of Economy Organization, was set up to control the nationalized cotton marketing, exporting, and consuming activities.

Area and production

Cotton as a major crop is relatively new to Syria. It was only after World War II that cotton production

became of major importance, although the crop gained some commercial significance from establishment of the nation's first gin shortly after World War I. Rapid expansion in Syria's cotton production was stimulated, still later, by the prospect of high prices and readily available markets as a result of the abnormal conditions surrounding the Korean conflict. World cotton prices rose to unusually high levels in the early 1950's under pressure from strong demand and fears that a shortage of raw cotton would develop.

In 1950, favorable yields on nearly 200,000 acres pushed Syria's cotton production to about 163,000 bales, compared with 25,000 bales on less than 50,000 acres in 1947. Cotton area was once more expanded—this time to over 500,000 acres—in 1951, but sharply lower yields bringing a crop of only 225,000 bales that year cooled many farmers' enthusiasm. Reduced planting and lower production followed, with the turnabout starting 2 years later toward an uptrend in production that continued from 1954 through 1964. Yields also followed the upward trend. In 1964, a crop of more than 800,000 bales on over 700,000 acres pushed average yields to nearly 550 pounds per acre. Information available just prior to publication indicated that yields in 1965 eased modestly, but the outturn was still relatively favorable.

Table 2.—COTTON: Area, lint yields, and production in Syria, 1955-65 ¹

Season ¹	Area	Yield	Production
	<i>1,000 acres</i>	<i>Lb. per acre</i>	<i>1,000 bales ²</i>
1955 -----	600	320	400
1956 -----	673	304	426
1957 -----	638	370	492
1958 -----	644	330	443
1959 -----	561	382	446
1960 -----	525	467	511
1961 -----	616	446	572
1962 -----	747	443	689
1963 -----	721	466	700
1964 -----	708	549	810
1965 ³ -----	730	533	810

¹ Beginning August 1. ² 480 pounds net weight. ³ Preliminary.

Source: Official and trade statistics of Syria.

Much of Syria's cotton has been planted in the areas of major rivers, because of the need for water in this arid country. Planting is concentrated largely in the country's northeastern corner and near the Euphrates and the Orontes Rivers, in the former case roughly parallel to the northern border, and in the latter, to the western one. About one-half the nation's cotton

is produced in the Province (Muhafazat) of Ar Rashid, in the north, and about one-half of the total crop in the Provinces of Halab, Al Hasakah, Hamah, and Dayr Az Zawr. More than 90 percent of Syria's cotton is grown on irrigated land. The raingrown crop is produced in Halab, Idlib, Al Ladhqiyyah, and Hamah.

Production practices

Before the production upsurge, about 1950, cultural practices were generally quite primitive. Most cotton seed was sown broadcast.

However, large profits in 1949 and 1950 enabled many farmers to purchase tractors and equipment; mechanization was also pushed by a large influx of capital from other parts of the Syrian economy. Now, farmers prepare land with tractor-powered equipment. Nevertheless, most planting and cultivation is still done by hand or with horse-drawn equipment.

Virtually all cotton is planted in rows about 2 feet apart, and the seeding rate is relatively heavy. Although the stand is later thinned, plant populations in Syrian fields are considerably higher than is normal for the United States and for many other cotton producing countries. The mature stalk is shorter than might be expected under irrigated conditions.

Syria's cotton growing season is relatively short, and farmers are often hard-pressed to plant, grow, and harvest the crop between the cool wet spring and the autumn rains.

Cotton production in Syria was developed as a large-scale enterprise; but in the late 1950's a change took place as the large estates began to be expropriated. Generally, the land on the estate was parceled out to the families who had been tenants. In 1966, the government required farmers who benefited from the Agrarian Reform Law to join cooperatives. Now, most farmers have no more than 15 to 30 acres in cotton, though a few former estate owners have considerably larger acreages.

For years, cotton had no strong competition for land in areas where irrigation water was available, except for limited acreage required to meet local demands for fruits, melons, and vegetables. During the 1965-66 season, profits from cotton declined. At present, little rotation is practiced, despite a law that limits cotton area to the acreage that can be assured adequate water. However, some officials consider crop rotation one of the most important cultural practices that should be given more emphasis.

Farmers are required to purchase planting seed from the Cotton Bureau for a specified acreage. This area cannot exceed 50 percent of the farmer's holdings in areas that are irrigated from rivers, 25 to 33 percent in areas irrigated from wells, and 50 percent in areas

where rainfall is considered adequate for dry land production. The law provides for enforcement of the acreage control, but there are indications that overplanting may occur in some areas. The deadline for planting is fixed by law for each district. The date varies from year to year, but the limit for all districts usually falls between April 15 and May 30. Licenses must be requested by the farmer at least a week before.

Syrian cotton areas are quite short of labor for cultivation and harvesting. This is especially true along the Euphrates River and its tributaries, where cotton acreage has expanded into areas with particularly low population density. Keen interest has been shown by both cotton farmers and government officials in introduction of more machinery to give better weed control and to facilitate harvesting.

However, a number of major changes in the present cultural practices will be required before additional mechanization will be practical. The numerous levees used for the extremely small irrigation basins virtually render impossible the use of ordinary power equipment for cultivation and harvesting. Mechanization is made more difficult by the narrow row spacing that is practiced by nearly all Syrian farmers. The USSR has been actively promoting use of its equipment, while Western farm equipment companies have shown relatively little interest in exploring this potential market.

Most Syrian cotton is produced under irrigation. A part of the crop in the vicinity of Homs, Hamah, and elsewhere is irrigated with water from surface reservoirs. However, irrigation water for the bulk of the crop is obtained from private pumping systems along the main rivers and tributaries. Practically all field irrigation is of the basin type. After spring plowing, low levees are thrown up around sections of the field. The basins formed are small, often no larger than a few square yards, and the levees interfere with the use of mechanical equipment. Despite the small size of most of the irrigation basins, many cotton plants obviously suffer from an uneven distribution of water. Almost no cotton land in Syria has been brought to the proper slope for efficient large-scale irrigation systems.

Lack of drainage, too, retards acreage expansion. Drainage of the Ghab and Roudj marshes along the Orontes River several years ago made about 185,000 acres available for crop production. Except for these systems, virtually no drainage is practiced in Syria. In many cotton raising areas, soil salinity is relatively high and the water table fairly near the surface. As a result, a combination of inadequate drainage and high saline content in the soil is probably the nation's most serious production problem. Correction would require large-scale projects involving more irrigation water, adequate drainage facilities, waste water disposal, and changes in production practices.

Construction of a reservoir on the Euphrates River that would impound sufficient water to irrigate several hundred thousand acres has been anticipated for a number of years. Many influences have delayed construction. These include changing political conditions that have occurred frequently, lack of foreign financing, and absence of international agreements with neighboring countries. The Syrian Government is now more actively planning this project, but it will be several years after the project is begun before irrigation water will be available from this source.

Limited quantities of imported fertilizers are used. Experience has shown that yields can be increased substantially through use of the more common elements. However, more research is needed to develop efficient combinations of fertilizer elements to achieve a better balance in meeting plant requirements.

In recent years, Syrian cotton has escaped heavy insect infestation over wide areas, and control of affected areas has in general been adequate. After a serious outbreak of pink bollworms and spiny bollworms in 1951, legislation was enacted that requires cotton farmers to protect the crop from insects by using cultural methods and insecticides recommended by officials in the Cotton Bureau. A few airplanes are used for application of insecticides, but a large part of the crop is sprayed with hand-operated equipment. To control pests, farmers are encouraged to destroy cotton stalks after harvest, but a common practice is to let animals graze on the fields after picking, as well as to use the stalks for winter fuel.

The most serious cotton disease in Syria is Verticillium wilt. The problem is still relatively minor for the crop as a whole; nevertheless, the affected areas are expanding. While losses to insects and disease have been small in recent years, pest control will surely become more difficult in the future. Greater dependence upon pesticides will become necessary as some insects develop resistance to the insecticides in current use, and as present controls reduce the population of beneficial insects that check the spread of cotton pests.

Financing—Before nationalization of the cotton economy in 1965, credit was obtained from gins, mill buyers, and exporters, and such other sources as equipment dealers and private banks. Now, a limited amount of short-term production credit is available from nationalized banks, but longer-term financing is extremely scarce. The establishment of cooperatives is being sponsored to meet credit needs and others.

Seed distribution

Farmers are allowed to plant only seeds that have been approved by the Cotton Bureau to assure maxi-

mum uniformity of fiber. An upland variety from the United States, Coker 100A, was introduced into Syria in 1958. This variety proved to be so popular that in the 1963-64 season Coker 100A was planted on all but about 1,000 acres of the nation's cotton acreage. The remaining 1,000 acres were planted to a reselection out of Coker 100A.

Much of the popularity achieved by Coker 100A can be attributed to high yields and a slightly shortened growing season relative to the varieties formerly used. Nevertheless, research efforts have been continued to develop or select other varieties that are tolerant to Verticillium wilt and that mature still earlier. Also, work has been continued to develop an extra-long staple cotton that would find acceptance by both farmers and foreign buyers. So far, little success has been achieved.

Each year, to obtain the seed which it alone distributes to Syrian cotton farmers, the Cotton Bureau imports certified seed from a U.S. company. This is multiplied on selected farms for a 2-year period until sufficient seed is available to plant the entire commercial crop. From the commercial crop, in turn, seed is available for crushing in the oil-mill industry.

In the future, Cotton Bureau officials plan to import Carolina Queen only. This variety is similar, in most technical respects, to Coker 100A.

Marketing and ginning

All Syrian cotton is hand-picked by local or migrant workers. Seed cotton is packed in the field into large burlap bags, which are used later for bale covering. Generally, trucks are used to haul the bagged seed cotton from farm to market. Frequently, the truckers transport in the same load bags of cotton from several different farms.

Marketing and ginning are planned in terms of export trade, which generally takes 85-90 percent of the crop. Several regional centers have been established under the nationalized marketing system. The cotton is transported to one of these, where the cotton is sampled for tentative grade selection. The truck is then directed to a specific gin that has need for that particular grade. The Syrian Marketing Organization sends seed cotton to various gins as needed to fill orders for particular grades received from foreign buyers. Each gin handles relatively few grades of cotton—thereby increasing uniformity of the ginned fiber.

At the gin, the seed cotton is classed into one of several grades based on color and foreign matter. The cotton is then weighed, and the payment to the farmer for his seed cotton is determined. According to regulations, the farmer can demand a reclassification upon deposit of the equivalent of about \$25.00 for each

classification requested if he is not satisfied with the grade assigned. The deposit is forfeited if the results of the retest substantiate the original determination. Despite disappointment with the grades of the 1965-66 crop, few farmers requested a reclassification.

For several years, Syrian cotton producers have been guaranteed a fixed minimum price by the government. However, world prices had remained above this level, and the entire crop moved through private trade channels to its markets.

Now all cotton is sold to the Cotton Marketing Organization, and the farmers are paid a price based on world price levels. Under the law, producer prices can be changed every week in accord with world market price fluctuations, but in actual practice this has not been done. In practice, the Marketing Organization supports prices to producers against extreme world price falls. It levies against each exported bale a fee put into a special fund to be used to bolster farmers' prices in periods of low international price levels. There are at present no provisions to support farm prices above the world level if the special fund should be exhausted.

Saw gins have steadily gained in popularity in recent years; more than one-third of the 1964-65 crop was processed on this type of equipment. The Marketing Organization is eager to increase saw gin capacity, because in foreign markets saw-ginned Syrian cotton now commands a price premium over roller-ginned Syrian fiber. Also, many roller gins in Syrian plants are in need of extensive repair, and the Marketing Organization would like to replace those units with high-capacity saw equipment.

There are about 55 cotton gins in Syria; these have a total of about 2,500 roller stands and 80 saw stands. Most saw gins have either 2 stands or 4. About one-half of the roller gins have 30 to 60 stands; a few, less than 15; and still a few others over 100. In Syria, ginning capacity is concentrated in a few cotton centers. About 80 percent of the crop is ginned in Aleppo, the remainder in Hamah, Idlib, Damascus, and Homs. This concentration necessitates long and relatively costly hauling of seed cotton from several outlying cotton producing areas. Ginning operations must be completed by a specified date before planting of the next season's crop to help control pink bollworms.

After the ginning stage, the lint is pressed at the gin into bales that weigh between 440 and 530 pounds gross. All bales are covered with jute bagging. Low-density bales have approximate measurements, in inches, of 56 x 33 x 29 and are bound with 6 to 8 metal bands. Standard-density bales are held by 8 to 10 bands and measure approximately, in inches, 41 x 31 x 21. High-density bales measure approximately, in inches, 41 x 23 x 19. These bales are secured by a long metal band one inch wide that encircles the bale

12 times. After pressing, the cotton is assembled into lots of 50 bales or less that have similar characteristics.

The Cotton Bureau handles the classification of ginned cotton. Because seed cotton is sorted before ginning into lots of the same grade, Syrian officials feel that it is unnecessary to class each bale. Instead, a sample is drawn from about 10 percent of the bales in what is believed to be an even-running lot. The classification of the samples is assigned to the entire lot.

Ginned cotton is classified into five grades for either roller- or saw-ginned fiber; these take into account color, foreign matter, and preparation. The grades ranked downward from most superior, are: Extra, Zero (base), 1, 2, and 3. Use is made of four intermediate grades that are not represented by official standards. Cotton that falls below Grade 3, and lots of cotton that contain bales with different characteristics or with mixed staple lengths, are earmarked for domestic consumption.

If requested, the Cotton Bureau will supply prospective foreign buyers with measurements of fiber strength and fineness.

Production outlook

Syrian agriculture has great potential, and if developed effectively, available resources would result in a substantial increase in output of cotton (as well as several other crops). Nevertheless, a number of problems must be overcome before Syria is likely to increase cotton production substantially. In fact, production may even decline from present levels. Recent acreage expansion resulted from the addition of irrigated land and the reclamation of swampland, while higher yields reflected the use of improved planting seed, more fertilizer and insecticides, and better cultural practices. Because of relatively widespread use now, only limited advances can be expected from these means in the next few years.

Little or no additional land is likely to be planted to cotton until more irrigation capacity is developed, and this prospect seems at least several years away.

The most important physical barrier to higher yields is a serious buildup of soil salinity in several major cotton producing areas. Virtually none of the present irrigation systems have provisions for adequate drainage; and with a water table near the surface in some areas, the salinity problem is sure to become critical in the future. In some fields, yields have been noticeably reduced, and parts of some fields have been withdrawn from crop production. Yields in some areas are now being reduced as well by Verticillium wilt; this is spreading and in time will become more serious.

Labor, especially for the harvest, is scarce; and cotton farming as now practiced in Syria is not conducive to further mechanization. Interest is developing in diversi-

fication of farm operations, which would involve changes of cotton acreage to other competitive uses. Certainly, a fall in cotton prices could encourage such a shift to alternative planting of fruit, vegetables, food

grains, and possibly, in some areas, to citrus and forage crops. Finally, the changeable political and economic situation is not favorable for a significant inflow of private capital into cotton production.

Raw Cotton Exports

Raw cotton exports are the primary source of foreign exchange in the Syrian Arab Republic, and government officials are fully aware of the importance to the economy of these shipments. When most of the cotton industry was nationalized in early 1965, the newly created Cotton Marketing Organization (CMO) tried to retain many of the key members of the private cotton trading firms. It was hoped that in this way foreign contacts could be maintained, and that a certain continuity of operations could be achieved. However, very few of these men were willing to work for the CMO. It is still too soon after nationalization to analyze fully the effects of the changeover. Reportedly, many private buyers in Western countries are reluctant to enter into contracts with the new organization; and increased dependence on sales to Communist countries could result.

Syria is a major exporter of cotton. Excluding the USSR, Syria was the largest shipper in Asia until 1964-65, when Turkey moved into the lead. During most recent years, Syria has exported between 85 and 90 percent of total production. Shipments reached a record 726,000 bales in 1964-65, compared with 608,000 a year earlier, and 162,000 during the 1950-54 period. Except for small quantities transshipped through Beirut, Lebanon, virtually all exports of Syrian cotton move through the port at Latakiah on the Mediterranean Sea.

Trucks are used to transport the cotton to the port.

The destination of Syria's cotton exports has changed sharply in the past decade. Before the mid-1950's, virtually all shipments moved to France, the United Kingdom, Italy, and West Germany. The pattern changed in the mid-1950's, and shipments to the Communist areas accounted for one-third of Syria's cotton exports during the 1955-59 period. These now take about two-thirds of all Syrian cotton exports. In 1964, Communist China took over one-fourth of total shipments.

For the past decade, a cotton festival has been held annually at Aleppo at harvest time to promote the activities of Syria's cotton industry. The primary function is to acquaint foreign buyers with current season's cotton crop, but special attention is also given to honoring outstanding farmers and to promotion of domestic consumption of cotton. The festival continues about a week, and it is attended by officials of the Syrian and foreign governments, foreign cotton buyers, and persons active in the domestic cotton industry. The festival is a gala affair, creating an atmosphere not unlike an American city that is host to a bowl game. Attractive exhibits are at the fair grounds, and there is a long parade of bold and imaginative floats, bands, and marching units. Syrian officials are most hospitable to

Table 3.—COTTON: Exports from Syria by country of destination, averages 1950-54 and 1955-59, annual 1960-64 ¹

Destination	Averages		1960 ¹	1961 ¹	1962 ¹	1963 ¹	1964 ¹
	1950-54 ²	1955-59 ³					
	1,000 bales ⁴	1,000 bales ⁴	1,000 bales ⁴	1,000 bales ⁴	1,000 bales ⁴	1,000 bales ⁴	1,000 bales ⁴
China, Mainland ⁴	(⁵)	33	61	34	78	203	203
France	70	120	57	73	125	46	87
Rumania	(⁶)	6	24	50	77	82	84
USSR	(⁶)	39	31	29	62	90	73
Poland	1	8	0	30	25	27	39
Germany, West	14	17	26	19	26	7	38
Italy	15	30	23	21	60	15	31
Lebanon ⁷	14	25	11	25	27	25	28
Hungary	(⁶)	5	8	0	13	3	27
Bulgaria	(⁶)	11	14	72	(⁵)	20	24
Netherlands	(⁶)	(⁵)	25	9	10	15	21
United Kingdom	37	15	8	10	6	7	12
Czechoslovakia	(⁶)	29	42	35	27	10	11
Other countries	11	39	115	67	78	58	48
Total	162	377	445	474	614	608	726

¹ Seasons beginning August 1. ² Calendar years. ³ 480 pounds net. ⁴ Includes Taiwan (Formosa) prior to January 1, 1953. ⁵ Less than 500 bales. ⁶ If any, included in other countries. ⁷ Includes transshipments.

Source: *Summary of Foreign Trade* (Damascus), and other information.

guests. Attractions include speeches, banquets, entertainment, and tours of historic sites.

Prices in international markets play a vital role in determining the attractiveness of cotton as a farm enterprise in Syria. For many years, farm price levels were connected directly to price levels in foreign import markets. The relationship is less direct now that all cotton is purchased by the Cotton Marketing Organization. Prices of Syrian growths, and those of most competing growths, have declined about 2 cents per pound in import markets since 1961. In addition, Syria is finding that many buyers prefer saw ginned cotton, and will take roller ginned fiber only at a discount.

Despite increased dependence in recent years on sales of cotton to Communist China and other Communist countries, Syria continues as a strong competitor of U.S. cotton. In 1964, Syrian shipments to nearly all destinations, Communist and non-Communist, were larger than a few years earlier. Even shipments to non-U.S. export markets in certain Communist countries are competitive in that such shipments tend to make available additional cotton in U.S. export markets from other competing growths. Syria ships cotton to nearly all markets that take U.S. cotton, and Syria's fiber is similar in character to the bulk of U.S. cotton that moves in international trade.

Table 4.—COTTON: C.i.f. offering prices for Syrian and United States S.M. 1-1/32 inches, in Liverpool, annual 1960-63, and monthly August 1964-December 1965 ¹

Year and month ²	Syrian	United States
	<i>Cents per lb.</i>	<i>Cents per lb.</i>
Annual:		
1960 -----	29.99	29.46
1961 -----	30.00	30.23
1962 -----	28.84	29.40
1963 -----	28.51	28.32
Monthly, 1964:		
August -----	28.21	28.55
September -----	28.28	28.48
October -----	28.13	28.51
November -----	27.98	28.56
December -----	28.19	28.77
January -----	28.52	28.90
February -----	28.70	29.02
March -----	28.62	29.05
April -----	28.50	29.13
May -----	28.14	27.86
June -----	28.02	27.81
July -----	27.55	27.80
Monthly, 1965:		
August -----	27.61	27.80
September -----	27.67	27.85
October -----	27.61	27.92
November -----	27.68	27.92
December -----	28.04	27.90

¹ Quotations are for prompt shipment when available.

² Year beginning August 1.

Liverpool Cotton Services, Ltd., Liverpool, England.

The Cotton Textile Industry

Syria had several relatively small textile mills, a number of knitting and garment factories, and a small home-weaving industry centered around Aleppo and Damascus. Like other commercial aspects of the cotton industry, all of these establishments were nationalized in early 1965. Where possible, company officials were retained to help operate the mills.

Mill capacity and cotton consumption have been increasing rather steadily for more than a decade. Total cotton consumption reached about 95,000 bales in 1964-65.

Syria has a fairly well-balanced textile industry, with the sections for spinning, weaving, and finishing in reasonable proportion. However, with a few striking exceptions, mills badly need more efficient equipment.

About two-thirds of the yarn that is spun in Syria falls below 20's count, with most of the remaining yarn below 30's. Little blending of cotton and manmade fibers takes place, or none, and none of the new finishes such as "wash-wear" are applied. In general, the textile industry is operated quite inefficiently from a technical standpoint. The industry uses domestic raw cotton exclusively. This fiber is quite satisfactory insofar as staple length is concerned for the counts of yarn pro-

duced, but a more satisfactory method of fiber selection and quality control will be needed when higher-count yarns are to be produced. In addition to the requirement that domestic cotton be used, all "mixed" and "below grade" cotton is earmarked for domestic consumption.

Syria is relatively self-sufficient in textiles, although in recent years there has been a small two-way trade between Syria and neighboring countries (except Israel).

Table 5.—Mill capacity and production of cotton yarn and fabric in Syria, 1957-64

Year ¹	Spindles	Looms	Yarn	Fabric
	<i>1,000</i>	<i>1,000</i>	<i>Million pounds</i>	<i>Million sq. yds.</i>
1957 -----	95	4,000	17.6	80.3
1958 -----	96	4,000	20.5	94.9
1959 -----	111	4,369	21.0	102.5
1960 -----	116	4,557	21.4	110.0
1961 -----	116	4,557	21.8	122.9
1962 -----	116	4,751	33.7	132.2
1963 -----	143	4,751	35.0	144.0
1964 -----	153	5,000	² 40.0	165.5

¹ Year beginning January 1. ² Estimated.

Source: Official reports of Syria.

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The annual per capita consumption of textiles in Syria has remained fairly steady in the past decade at about 11 pounds. In 1962, per capita use of cotton was 6.2 pounds; of rayon, 3.5 pounds. Wool accounted for the remaining 1.3 pounds of textiles used.

The future of Syria's textile industry now rests with the government. Much of the equipment in use is quite inefficient. Reportedly, the government is interested in promoting exports of textiles, and in improving the

industry's efficiency and output. However, large-scale modernization of the mills would strain the government's limited resources at a time when many other demands must be met. Most of the equipment is being operated nearly full-time, 7 days weekly. Therefore, increased output must come from more efficient operations and/or additional capacity. Gains—though limited ones—in both are likely, and cotton consumption could rise modestly in the next several years.